

## FREQUENTLY ASKED QUESTIONS

***Q. How do I access my bill and make an online payment?***

The first statement for Fall 2023-2024 will be available in Transact/CASHNet, Caltech's online student billing system, on September 11<sup>th</sup>, 2023. Click here for [Transact/CASHNet](#) instructions. Please note: You have to have a balance due in order to make a payment.

***Q. I've been awarded a Kendall Loan or a Caltech Loan but haven't completed any of the documents that are required. Why are these loans appearing on my billing statement?***

These loans are reflected on the billing statement only as a "pending" credit simply to provide a full picture of aid that you've accepted. The credit will appear on your statement when you have completed and submitted all the documents required.

***Q. I've been awarded outside scholarship(s) that are not reflected on my billing statement. May I deduct the award amount from the tuition due?***

All scholarships are divided by thirds and disbursed by term. You can deduct one-third of the total scholarship(s) to be received, from your balance. The credit will be posted to the account when the scholarship check is received. You may contact the Bursar's Office to verify the amount if needed.

***Q. My Financial Aid Award Letter indicates a "Work-Study" award that isn't reflected on my billing statement. I know that I've accepted this award. Why doesn't it appear on my statement?***

Work Study represents the maximum amount you may earn in the relevant programs. After you obtain on-campus employment, work-study earnings are disbursed in payroll checks to the student (you) every two weeks for the number of hours worked. You may apply your earnings toward tuition by endorsing your checks over to Caltech in the Bursar's Office.

***Q. Where can I wire a payment?***

- California Institute of Technology – Account Number 926011052
- General Bank Reference Address: JP Morgan Chase, New York, NY 10004
- Bank Routing and Transit Number 021000021
- SWIFT Code: CHASUS33
- Remit US Dollar amount only
- Reference student name and UID in the memo section of the wire

***Q. I would like my 529 Plan, or other outside agency, to mail a check to Caltech. What address do I use?***

Caltech, Bursar's Office  
Mail Code 120-87  
Pasadena, CA 91125-0001

\*Also, you can make a 529 payment through Transact, Caltech's online student billing system. Transact charges a fee of \$10.00 for this option. Please note not all 529 vendors are available in Transact's payment option.

***Q. Is there a payment plan available for tuition and fees?***

Yes, Transact/CASHNet offers a Tuition and Fee Payment Plan to pay in smaller, more manageable installments. You will be able to choose a payment plan that will divide your total due into three payments for the term. Transact/CASHNet charges a \$35.00 enrollment fee per term and late fees can be charged.

Payment Plan open enrollment dates for each term are listed below:

- **Fall term:** 9/11/2023 to 9/24/2023
- **Winter Term:** 12/11/2023 to 12/24/2023
- **Spring Term:** 3/11/2024 to 3/24/2024

***Q. Who can access my bursar's account information and how do I authorize third parties (like my parents) to have access to it as well?***

You need to complete the FERPA Waiver Form (Family Educational Rights and Privacy Act) to authorize third parties, like your parents or family members to have access to your bursar's account information. Make sure to give your authorized parties the password you provided on the FERPA Waiver Form otherwise access will be denied.

***Q. I have questions regarding housing and food fees, who do I contact?***

You will contact the Housing Office at 626-395-6176 or email at [ughousing@caltech.edu](mailto:ughousing@caltech.edu)

***Q. If I have other questions about my account or required documents not answered here, how may I contact the Bursar's Office?***

You can send an email to [bursardocuments@caltech.edu](mailto:bursardocuments@caltech.edu) or leave a message on the Bursar's main line at 626-395-2988.